



USDA TURKEY MARKET NEWS REPORT

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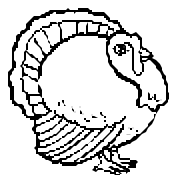
Agricultural Marketing Service

Poultry Programs

Market News Branch

NATIONAL TURKEY MARKET AT-A-GLANCE

DOMESTIC MARKET HIGHLIGHTS



The market tone on 8-16 lb. hens and 16-24 lb. toms was steady. Demand and trading was light for current shipment, fair for deferred delivery. In the West, packer label hens and toms traded with price ceilings of 72 and 69 cents respectively for October shipment. Offerings of whole birds adequate for current needs. The weekly weighted average prices of hens were up from the same week a year ago, prices on toms were still below year ago levels. A heavy volume of 4-8 lb A grade breasts were booked for August deliveries. Bulk meat and part trading was light.

EXPORT MARKET HIGHLIGHTS

Trading for the week was active on frozen tom drums and frozen thigh meat as some sellers cleared excess inventory. Other sellers were reluctant to entertain lower trending bids.

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **JULY 19, 2002**

CURRENT SHIPMENTS 2/					FORWARD SHIPMENTS 6/			OPEN COMMITMENTS 7/	
	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	66-67	-	-	-	71.00	160	OCT	-	-
CENTRAL REGION 4/	65-66	66	66.00	160	-	-	-	-	-
WESTERN REGION 5/	65-67	-	-	-	71.00	40	NOV	680	OCT
16-24 LB TOMS									
EASTERN REGION	60-61	-	-	-	66.00	80	OCT	120	JUL
CENTRAL REGION	59-60	60	60.00	80	-	-	-	-	-
WESTERN REGION	59-61	-	-	-	-	-	-	640	OCT

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **JULY 18, 2002**

CURRENT SHIPMENTS 2/					FORWARD SHIPMENTS 6/			OPEN COMMITMENTS 7/	
	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	66-68	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	65-67	-	-	-	-	-	-	-	-
WESTERN REGION 5/	66-68	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION	60-63	-	-	-	-	-	-	-	-
CENTRAL REGION	59-62	-	-	-	-	-	-	-	-
WESTERN REGION	59-63	-	-	-	-	-	-	-	-

1/ May include product stored at temperatures in range of 1 to 25 degrees F. 2/ Includes product priced for shipment within 14 days.

3/ Includes product with 3 percent broth basting. 4/ Includes product with 3-6 percent broth basting. 5/ Includes products with 6 percent broth basting. 6/ Includes product committed for pricing during the previous 24 hours but shipment in more than 14 days from date of commitment. 7/ Includes product committed during previous 24 hours at prices to be determined at later date.

WEIGHTED AVERAGE PRICES FOR WHOLE YOUNG TURKEYS, FROZEN CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS)

WEEK ENDING JULY 19, 2002	CURRENT WEEK	LAST WEEK	SAME WEEK YEAR AGO
8-16 LB HENS			
EASTERN REGION	68.00	66.50**	66.66
CENTRAL REGION	66.00	66.00	64.50
WESTERN REGION	66.80**	66.50**	66.00**
16-24 LB TOMS			
EASTERN REGION	62.00	61.00**	61.18
CENTRAL REGION	60.00	60.00	61.00
WESTERN REGION	59.00	61.00**	62.00**

**BASED ON OFFERS

**SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED TURKEY,
DELIVERED TO RETAILERS**

	<u>RANGE</u>
FRESH TURKEYS Y HENS 8-16#	96
FRESH Y TOMS 14-24#	96
FROZEN TURKEYS Y HENS 8-16#	71
FROZEN TURKEYS Y TOMS 14-24#	66
FROZEN TURKEYS Y TOMS 24-28#	68-72

**SAN FRANCISCO PROCESSED TURKEY
DELIVERED TO RESTAURANTS AND INSTITUTIONS**

	<u>RANGE</u>
TURKEYS Y HENS	89-119
TURKEYS Y TOMS UNDER 22#	89-119
TURKEYS Y TOMS 22-24#	85-105
TURKEYS Y TOMS 24-26#	84-105
TURKEYS Y TOMS 26 LBS & OVER	102-105

FRESH TURKEYS WITH TIMERS OR EQUIVALENT U.S. GRADE A,
DELIVERED FIRST RECEIVERS, EASTERN REGION, CENTS
PER POUND, WEEK OF 22-JUL-2002

	<u>(8-16#)</u>		<u>(16-24#)</u>	
	<u>HENS</u>	<u>LBS</u>	<u>TOMS</u>	<u>LBS</u>
	<u>PRICE</u>	<u>(000)</u>	<u>PRICE</u>	<u>(000)</u>
SALES (PROMOTIONS INCLUDED)	71.93	58	65.38	13
SALES (PROMOTIONS NOT INCLUDED)	71.93	58	65.38	13
SALES (PROMOTIONS ONLY)				
SALES (PRICE TO BE DETERMINED)				

TURKEY MOVEMENT TREND
(IN THOUSAND POUNDS)**SLAUGHTER-CERTIFIED RTC TURKEYS**

JUNE	431,206*
JULY 1-13, 2002	191,027*
To date 2002	2,760,434*
To date 2001	2,756,892*

* PRELIMINARY

NUMBER OF TURKEYS SLTRD IN FEDERALLY INSP PLANTSBY GEOGRAPHICAL AREAS WEEK ENDING 13-Jul-2002
(PRELIMINARY) (RELEASED 12:00 NOON CENTRAL TIME)

YOUNG TURKEYS			TOTAL TURKEYS			
		PCT	AVG		OLD	AVG
		CHG	LIVE		BANDED	LIVE
-THOUSAND HEAD-		PW	WT	-THOUSAND HEAD-		WT
N EAST	668	11	22.42	(A)	672	22.42
SATL	829	52	29.59	(A)	833	29.59
N CENT	2,407	31	30.52	(A)	2,411	30.52
S CENT	508	31	22.29	(A)	512	22.29
WEST	443	9	24.12	(A)	446	24.12
U.S. TOTAL	4,855(B)	29	27.80	19	4,874	27.80
TO-DATE						
2002	126,298(B)			228	126,526	
TO-DATE						
2001	131,366(B)			324	131,690	

(A) Not published to avoid disclosing individual operations.

(B) Number of young banded breeder turks included: this week 69,000 for the year 1,330,000; last year to date 1,084,000.

LIVE TURKEYS SLAUGHTERED

WEEK ENDING 13-Jul-2002

	<u>YOUNG</u>		<u>YOUNG</u>	<u>OLD</u>	<u>TOTAL</u>
	<u>HENS</u>	<u>TOMS</u>	<u>BREEDERS</u>		
	<u>THOUSANDS</u>				
HEAD	1,836	2,950	69	19	4,874
AVG WT	15.51	35.54	23.99	27.26	27.80
LAST WEEK	1,467	2,256	53	4	3,780
SAME WK YR AGO	2,013	2,808	65	15	4,901
AVG WT	16.51	33.83	23.77	25.88	26.56
TO-DATE/2002	50,380	74,588	1,330	228	126,526
TO-DATE/2001	55,737	74,545	1,084	324	131,690

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NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 18 JULY 2002.

The tom bulk parts undertone ranged from steady at best on 2-joints to instances weak on drums. Domestic demand was slow. Export demand was light to fair, best on drums at lower trending price levels for non-Russian destinations. Offerings were available and held with varied degrees of confidence. The frozen thigh meat undertone was steady to weak with some sellers less willing to resist the lower buyer bids than others. Demand light. Offerings adequate to burdensome. Domestic trading light with some spot strength noted on fresh tom breast meat and spot softness on fresh mechanically separated turkey. Export trading was heavy on tom drums for July - August shipments and light on mixed hen and tom thigh meat, -4 months age.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		M	93.00	40
BREASTS, 4-8 LBS GRADE A—FRESH 2/	154.00		154.00	10
BREASTS, 4-8 LBS PLANT GRADE 2/		F	91.00	40
DRUMSTICKS, TOM		W	20.00	14
DRUMSTICKS, TOM—FRESH		W	21.00	40
DRUMSTICKS, HEN		F	22.00	11
WINGS, FULL-CUT, TOM		W	21.82	34
WINGS, FULL-CUT, HEN		F	24.00	15
WINGS, V-TYPE, TOM		M	28.00	40
WINGS, V-TYPE, HEN		M	52.50	120
NECKS, TOM		W	15.41	34
NECKS, HEN		F	16.00	8
BREASTS, B/S, TOM 3/		M	133.00	120
BREASTS, B/S, TOM—FRESH 3/	159.00		159.00	30
THIGH MEAT				
THIGH MEAT—FRESH		M	52.00	20
BREAST TRIM MEAT		W	88.00	40
SCAPULA MEAT		W	78.00	80
TENDERLOINS		T	123.00	16
DESTRAPPED TENDERS		W	112.00	80
DESTRAPPED TENDERS—FRESH		M	135.00	40
WING MEAT WITH SKIN		M	51.00	60
MECHANICALLY SEPARATED 4/	19.00		19.00	40
MECHANICALLY SEPARATED—FRESH 4/	15.50		15.50	40

EXPORT TRADING

DRUMSTICKS, TOMS	17.00-23.00		20.15	936
WINGS FULL-CUT - TOMS	19.50		19.50	40
WINGS, V-TYPE, TOM				
TAILS		M	20.00	52
MECHANICALLY SEPARATED 4/		T	18.00	40
THIGH MEAT - FROZEN	38.00-41.00		38.43	364

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins. 4/ 15-20% fat with skin added.

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 19 JULY 2002.

The fresh white meat undertone was mostly steady in the Midwest and the East. However, some weakness was noted on fresh tom breast meat in the West with some sellers willing to negotiate. Demand ranged slow to moderate, best for prompt shipments in the Midwest and East. Fresh tom breast meat traded at 151 delivered July, 2002 - June, 2003. Offerings of fresh tom breast meat ranged from adequate to instances burdensome, balance of fresh white meat offerings adequate. Frozen white meat undertone steady to weak. Demand light, best on breast trim, scapula and destrapped tenderloins. Offerings available. Bulk parts demand fair to good on tom drums for domestic and export shipments as they attempt to find a floor, balance light. Domestic trading centered on a heavy volume of 4-8 lb. breasts and on a fair volume of tom drums. Export trading was heavy on tom drums at the lower trending prices and on frozen thigh meat. The export frozen thigh meat market is mixed as some move excess inventories at lower prices while others buy product at higher price levels in anticipation of some previously closed markets opening.

DOMESTIC TRADING	PRICE RANGE	LST CDE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/	96.00		96.00	1,000	95.88	1,040
BREASTS, 4-8 LBS GRADE A—FRESH 2/		R	154.00	10	154.00	10
BREASTS, 4-8 LBS PLANT GRADE 2/	91.00		91.00	240	91.00	240
DRUMSTICKS, TOM	17.00-21.00		18.26	432	19.31	636
DRUMSTICKS, TOM—FRESH	20.00		20.00	51	20.44	91
DRUMSTICKS, HEN	21.00		21.00	40	21.00	40
WINGS, FULL-CUT, TOM	20.00-24.00		21.30	166	21.95	316
WINGS, FULL-CUT, HEN		F	24.00	15		
WINGS, V-TYPE, TOM		M	28.00	40	28.00	40
WINGS, V-TYPE, HEN		M	52.50	120	52.50	120
NECKS, TOM	14.00-16.00		14.45	141	15.16	381
NECKS, HEN		F	16.00	8		
BREASTS, B/S, TOM 3/		M	133.00	120	133.00	120
BREASTS, B/S, TOM—FRESH 3/	155.00-159.00		157.50	160	158.20	822
THIGH MEAT	49.00		49.00	14	49.00	14
THIGH MEAT—FRESH		M	52.00	20	52.00	20
BREAST TRIM MEAT	84.00-85.00		84.50	80	86.29	280
SCAPULA MEAT	77.00-77.50		77.25	80	77.86	280
TENDERLOINS	120.00		120.00	16	120.67	72
DESTRAPPED TENDERS	113.00		113.00	80	113.64	220
DESTRAPPED TENDERS—FRESH	135.00		135.00	40	135.00	80
WING MEAT WITH SKIN		M	51.00	60	51.00	60
MECHANICALLY SEPARATED 4/	18.00-19.00		18.50	80	18.67	120
MECHANICALLY SEPARATED—FRESH 4/	18.00-18.50		18.24	82	17.90	1,317
EXPORT TRADING						
DRUMSTICKS, TOMS	19.00-21.00		19.28	1,136	20.25	3,336
WINGS FULL-CUT - TOMS		R	19.50	40	19.50	40
WINGS, V-TYPE, TOM	27.00		27.00	52	27.00	52
TAILS		M	20.00	52	20.00	52
MECHANICALLY SEPARATED 4/	18.00-20.00		18.67	60	18.40	100
THIGH MEAT - FROZEN	41.00-55.00		48.42	744	46.62	1,492

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

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2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins. 4/ 15-20% fat with skin added.